




9/12/2013



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Recovering hearts. Saving lives.

*Concur Travel & Expense Reimbursement
User Training*



SEP 18 1 00 PM '13
2013 SEP 18 P 3:32
4:20 PM '13

Agenda

- Easy Expense Reporting
- Demo
- Key Policy Rules
- Expense Types & How to Use Them
- Health Care Providers (HCP) Expenses
- Ways to Simplify Creation of Expense Reports
- Next Steps
- Reviewing & Approving Expense Reports
- Questions



9/12/2013

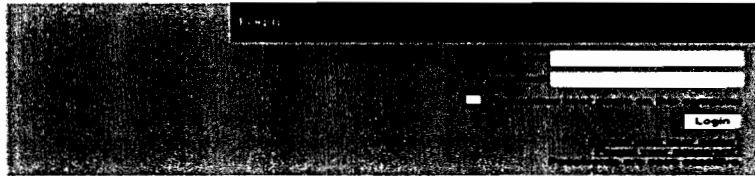
Logging In

- Website: <https://www.concursolutions.com/portal.asp>
- User Name: email address without the .com example: kwallace@abiomed
- Initial Password: welcome

Welcome

If you experience difficulty logging into the site, please click on the "Forgot your password?" link below.

Concur



TripIt

Concur now integrates with TripIt.
Learn more about the integration here.

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Change Password

- You will be prompted to change your password the first time you log onto Concur, the password for your first log on is "welcome"

My Concur | Travel | Expense | Invoice | Reporting | Administration | Profile

Profile | Change Password | Travel Settings | My Account | Travel Expenses | Reports | My Profile Settings

My Profile

Personal Information

Personal Information
Company Information
Contact Information
Emergency Contact
Credit Cards

Travel Settings

Travel Settings
Travel Preferences
International Travel
Frequent Traveler Program
Assistance/Perquisites

Expense Settings

Expense Information

Change Password

Password must be at least 8 characters. It must contain numbers (0-9), and may contain upper and lower case characters (A-Z, a-z), and symbols (such as !, @, #, \$, %, ^, &, *). All fields are required.

Note: Passwords are case sensitive.

Old Password: New Password: Re-enter New Password:

Password Hint (we will email this to you if you forget your password):

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5

- [illegible]

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|--|---------------|----------------|----------------|------------------|----------------|
| My Concur | Travel | Expense | Invoice | Reporting | Profile |
| Personal Information Change Password System Settings Mobile Registration Travel Expense Reimbursement System Help/Settings | | | | | |
| Your Information
Personal Information
Company Information
Contact Information
Emergency Contact
Credit Cards | | | | | |
| Travel Settings
Travel Preferences
International Travel
Frequent Traveler Programs | | | | | |

9/12/2013

Mobile Applications

- Applications are available for Blackberry, iPhone, iPad and Android. Through mobile apps you can book travel, enter and approve expense reports.


Expense Reporting Administration Profile

My Password System Settings **Mobile Registration** Travel Voucher Reassignment

You've been designated as an assistant for one or more people. If you'd like to edit their profiles instead of yours, select a name from the list to the right. Me Search

Welcome To Concur for Mobile


Set PIN



To log in to Concur on your mobile device, you must enter your User Name and a Mobile PIN. Your User Name is terrace@abiomed.com. If you have not yet set up or need to change a PIN, enter a PIN (which can include letters, numbers, and special characters such as !, \$, or # but no spaces) in the fields below.

Mobile PIN Verify Mobile PIN

Concur for mobile is available on BlackBerry, iPhone and Android devices

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Status Updates & Approval Notifications

- Status Updates are sent via email every time you make a travel reservation or your expense report status changes
 - Travel: Travel Itinerary, Ticketed, Upcoming Travel
 - Expense: Approved, Rejected, Resubmitted, and Authorized for Payment


Note: *Approved and Authorized for Payment emails are only sent if the traveler has selected this feature*
- Email messages contain the URL to Concur Travel & Expense
- Approval Notifications are sent to your manager when your report is ready for approval

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Key Policy Rules

- Reports cannot be submitted without receipts attached except for tips, tolls and mileage
- Charges imported from AMEX with the exception of hotels don't require additional receipts
- Sales employees on Runzheimer ineligible for mileage reimbursement
- Sales employees ineligible for home office expense reimbursement (should be using our commercial accounts at FedEx/Kinko's & Staples)
- T&E older than 60 days will be flagged and require justification
- Meals exceeding policy limits will be flagged and require justification
- Business meals require attendee information
- Health Care Provider (HCP) expenses require additional attendee information

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Expense Types & How to Use Them

- Business Meals
 - Meals with more than just you in attendance
 - Attendees must be listed out
 - No Doctors or Health Care Providers (HCP)
- Entertainment
 - Not meals
 - Gift baskets
- Meetings
 - Don't require attendees
 - No itemization required

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Health Care Provider Expenses (HCP)

11

- Sunshine Act – Federal Law
- Expense Types are Similar
 - HCP Meals
 - HCP Lodging
 - Attendees are Required for all HCP Expenses
 - List Doctor & Hospital
- Phase 1
- Phase 2



Ways to Simplify Creation of Expense Claims

12

- Use company provided AMEX Cards automatically linked to Concur
- Book all travel with Colpitts – automatically links expenses to Concur
- Utilize Corporate/Company Paid Arrangements whenever possible:
 - Use company cell phones & wireless cards provided through Wireless Analytics
 - Use commercial accounts with Staples (1008872), FedEx & Kinko's for office supplies (0301040296) and shipping (300447414)
 - Use direct bill arrangements set up by corporate finance for meetings & business functions at hotels



9/12/2013

Next Steps

13

- Finalize any current expense reports in SAP
- Notify Kristen Wallace when your last SAP claim is finalized
- Kristen will activate your Concur account & send Concur User Guide
- Cut over to SAP can be done as soon training is attended
- All employees to be off SAP by end of November

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Reviewing & Approving Expense Reports

14

- Look for Audit Flags
- Look for Receipts
- Look for Completeness
 - Vendor Names
 - Correct Expense Types
 - Attendees Listed When Required
- Is Expense in Accordance with Company Policy
- Unusual Items

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